

DISTRIBUTOR SUPPORT CENTER EVALUATION GUIDELINES

The Distributor shall establish and maintain a Service and Support Center that is appropriately located within the Distributor's Territory of Operation to effectively support the Customer base. The Service Center shall have the appropriate staff, have adequate spare and replacement equipment and all the necessary installation and maintenance tools required by the installed base.

SERVICE CENTER

Item No.	Distributor Organization Chart. Capabilities offered to the customers. Review & Verify.					
1	Installation.	5 Guayaquil 3 Quito	No. of people:	8	(Critical)	2
2	Project Management.	3 Guayaquil 4 Quito	No. of people:	7	(Critical)	2
3	Sales Engineering.	Shared Resource	No. of people:	7	(Critical)	2
4	Consulting Services.	Shared Resource	No. of people:		(Critical)	2
	First Level Technical Support			17		
5	Dispatch/field service.	Both offices	No. of people:	15	(Critical)	3
6	Remote Diagnostics.	No Dedicated Person	No. of people:		(Critical)	0
7	Second Level Technical Support (Interface to CTAS)		No. of people:	2	(Critical)	2
8	Distributor has Lab Facilities for problem duplications.					
9	Distributor has Training Center.	NO				
10	Distributor has Demonstration Room	NO				
	Note: Distributor may utilize Training Center for problem duplication and trouble diagnostics.					
11	Distributor Coverage Area (based on installed base). Number of Technical Service Centers throughout country or the responsible region.	Obtain locations info. and maps.			(Critical)	3
	Tel. numbers if these Service Centers:		690-888 Guay. / 455-549 Quito		Verify 3 Offices	
	Size of installed base: 51 M1 150 Norstar		And an office in Cuenca			
12	Installed base data is updated on a regular basis.	(User name, tel. number, equipment's, release's information, modem number, address, contacts).	Verify		(Non Critical)	2
	All services are available during normal working hours.		Verify		(Critical)	3
13	Call Center (ACD).	NO	Verif	call volume low	(Non-Critical)	2
14	Dedicated telephone numbers for service.	NO		call volume low	(Critical)	2
15	Fax:	NOT USE FOR SERVICE CALLS			(Non Critical)	3
16	Service request call procedures and escalation is in place.	Verify call flow & escalation			(Critical)	2
17	Service request calls must be logged and maintained.	Obtain printouts of Service			(Critical)	2
18	order forms (problems and add, move & changes).					
19	Distributor utilizes Customer Satisfaction Surveys.	Review & discuss all results.			(Non-Critical)	0

Sub Total Critical 25
Sub Total Non-Critical: 7

STAFF COMPETENCY

Staff Engineers supporting the Service Center must be qualified in each of the NORTEL Meridian 1 products supported by the Distributor. The minimum requirement should include successful completion of all related NORTEL certified training courses.

Item No.				
20	_____	Distributor's technical staff have successfully completed certified NORTEL training courses for all products supported.	Verify Diploma or Certificate	(Critical) 1
21	_____	Distributor holds in-house training or company sponsored training seminars, including off-site NORTEL training.	Verify which courses are offered.	(Critical) 1
22	_____	Procedure is in place for knowledge transfer within the organization (train the trainer concept) after a Nortel Tech. Transfer, CTAS Advanced Training's, Product Bulletins, etc.).	Verify	(Critical) 2
23	_____	Staff technical skill assessment is available.	Complete technical skill assessment.	(Critical) 3
24	_____	Norstar		(Critical) 3
25	_____	Meridian 1 Software Knowledge		(Critical) 2
26	_____	Meridian 1 Maintenance Knowledge		(Critical) 2
27	_____	Meridian Mail Knowledge		(Critical) 1
28	_____	Meridian MAX Knowledge		(Critical) 1
29	_____	Meridian LINK Knowledge		(Critical) 1
30	_____	Meridian CCR Knowledge		(Critical) N/A
31	_____	Meridian IVR Knowledge		(Critical) N/A
32	_____	Meridian Administration Tool Knowledge		(Critical) 1

Sub Total Critical:

18

Sub Total Non-Critical:

INSTALLATION

Distributor shall install all products distributed and shall do so in strict accordance with the requirements set forth by NORTEL and found within the Northern Telecom Procedures (NTP'S). Distributor must also adhere to all Updates, Product Bulletins and changes as prescribed by NORTEL. This must be done in a timely fashion.

Item No.				
33	_____	Hand-off and Sign-Off document for all installations. (Job Book, User Training Information NTP's). Job Book must include Sales Contract or P.O., Proposal, Autoquote, Wiring/Cabling Information for MDF/IDF, Customer Data Survey (Printouts, Telco Data, etc.) and Acceptance Testing.	Obtain copy and verify information.	(Critical) 2
34	_____	Job Books for all sites installed are maintain updated with dates.		(Non Critical) 1
35	_____	Distributor provides user training to the customer.		(Critical) 2
	_____	Training material is updated.		
	_____	No. of people to provide user training: 3		
36	_____	Distributor completes Post Installation Site Audit (3) or Check list (1-2).		(Non-Critical) 1
37	_____	Distributor completes Post Installation Customer Satisfaction (CSAT) Survey.		(Non-Critical) 1
	_____	Obtain copy.		
38	_____	Meridian Systems Registration process is in place to notify NORTEL of new installations within 10 days.		(Critical) 0
39	_____	Procedure is in place for CTAS patch insertion before cut-over of new systems, or upgrades to new software releases.		(Critical) 2

Sub Total Critical:

6

Sub Total Non-Critical:

3

ADDS, MOVES AND CHANGES (AMC)

Item No.				
40	Documentation available to verify work done (acceptance) by distributor's personnel at customer site.	(Critical)		3
41	Distributor have statistics for Turnaround times.	Verify (Non-Critical)		0
42	Customer site records are updated after add, move and changes.	Verify (Non Critical)		0

Sub Total Critical: 3

Sub Total Non-Critical: 0

MAINTENANCE

Item No.				
	Number of maintenance contracts: 8			
43	Maintenance contracts are offered to customers.	Obtain copy. (Critical)		3
44	Maintenance support is available with response times negotiated to the satisfaction of all parties.	(Critical)		3
45	On-site preventative maintenance is perform and documented.	(Critical)		2
46	System software backup are perform biweekly or as defined in the maintenance agreement.	(Critical)		2
47	Remote alarms monitoring 24 hours a day or as defined in the maintenance agreement.	NO (Critical)		0
48	Emergency service is provided 24x7, including Holidays.	Verify (Critical)		3
49	Number of people on call 2 in each city	(Critical)		3
50	On call staff is rotated on a regular base.	(Non-Critical)		2
51	Telephone access:	(Critical)		1
52	Pagers: On Call Technician Only	(Critical)		3
53	Cellular: NO	(Critical)		0
54	Escalation Procedure:	(Critical)		3
55	Respond time within 15 minutes.	No phones in most homes (Critical)		1
56	Remote Dial-in capabilities for on-call.	No phones in most homes (Critical)		0
57	Lap Top availability for on-call Engineers.	Laptops 1 but no phones (Critical)		1
58	Off hours access to the stocks.	In Guayaquil (Critical)		1
59	Distributor use "On-Call Kit". (Containing customer list with contact name, address, telephone, modems and passwords of sites.	(Non-Critical)		2
60	Engineers or Technicians has transportation available for off-hours or weekends. N/A	(Non-Critical)		3
61	Remote Maintenance Dial-out capabilities and Tools	(Critical)		1
62	Number of telephones	(Critical)		1
63	Number of Modems.	(Critical)		1
64	Number of PC/Terminals.	(Critical)		2
65	Number of Printers.	(Non-Critical)		1
66	Statistics	(Non-Critical)		1
67	Number of service calls (day, week, month, etc.).	7 calls per day (Non-Critical)		0
68	Response and resolution times for Emergencies.	(Non-Critical)		0
69	Response and resolution times for regular maintenance problems.	(Non-Critical)		2
70	Number of problems escalated to CTAS	(Non-Critical)		0
71	Historical data for problems is maintained for proactive resolution	(Critical)		2
72	Technicians have procedure to obtain replacement parts for Service Calls	(Critical)		3
73	Sign-off procedures in place for work done by Technicians at customer sites	(Non-Critical)		3
74	Procedure in place to identify and tag all defective material before being shipped for repair.	(Critical)		1
75	Lab Facilities for problem duplication and diagnostics. Obtain list of equipment's.			
	X11 Rls. 22 An Option 11C with Rls.22			

Distributor Development

___ Opt 51C or 61C or 81C
 ___ MAX, Mail, MAT NO

Sub Total Critical: 37
 Sub Total Non-Critical: 14

ENGINEERING & CONSULTING SERVICES

Engineering and Consulting services are available to the customers from the distributor. Services should include, but not be limited to the following:

Item No.			
76	___	System Configuration Support for new systems, upgrades, etc.	(Critical) 1
77	___	Network Design Support	(Critical) 2
78	___	Network Optimization	(Non-Critical) 2
79	___	System Traffic and Performance Evaluation	(Critical) 2
80	___	Security/Toll Fraud Audits	(Non-Critical) 2

Sub Total Critical: 5
 Sub Total Non-Critical: 4

DOCUMENTATION

Item No.			
81	___	NTP / Documentation and course material updated	(Critical) 2
	___	Norstar	
	___	Option 11's	
	___	Option 21-81C	
	___	X11 Software Features Rls. 22	Did not have Rls. 22 NTP
	___	ISDN	
	___	ACD	
	___	BARS & NARS	Quito did not have Updated NTPs
	___	Meridian Mail	Mail NTP RLS 9
	___	Meridian Link	
	___	Meridian MAX	MAX NTP RLS 6
	___	Meridian IVR	
	___	Meridian CCR	
	___	NAC	
	___	Conversions	
	___	Meridian Administration Tool (MAT)	
	___	Bulletins Information	
82	___	Access to S/W Patches through Nortel Crossroad	N/A no access to Internet (Critical) 1

Sub Total Critical: 3
 Sub Total Non-Critical:

TEST EQUIPMENT

List of minimum tools required to successfully investigate and correct all Meridian 1 Product problems.
(In certain instances, equipment may be rented.)

Item No.			
83	Modems.	(Critical)	2
84	PC/Terminals.	(Critical)	2
85	Analyzers. (T-1, E-1, R2)	(Critical)	0
86	ISDN Analyzers.	(Critical)	0
87	Oscilloscopes e/w Memory.	(Non-Critical)	3
88	Ground Testing Equipment.	(Critical)	3
89	Amp Clamp. (Current Tester)	(Critical)	0
90	Data Scopes Analyzer. (PMSI, Link, Mail, Max and IVR)	(Non-Critical)	0
91	Installation/Maintenance Technician Kit.	(Critical)	3

Sub Total Critical: 10
Sub Total Non-Critical: 3

INVENTORY

Item No.			
92	Distributor has a full inventory for all supported products and applications, for miscellaneous orders and maintenance. Obtain copy of the list. Verify at random. spare/replacement equipment and on-hand quantities. Match results with Distributor results. Present any discrepancy to Distributor.	(Critical)	2
93	Distributor has procedure to increase inventory when installed base grows, or new products are introduced to the market by Nortel.	(Critical)	2
94	Procedure is in place for replacing and replenishing stock equipment taken for Customer Orders and Maintenance defective material. Verify	(Critical)	1
95	Inventory locations, drop off points and Depots utilized by Distributor to make sure Distributor has complete coverage of it's Region. Obtain copy list.	(Critical)	2

Sub Total Critical: 7
Sub Total Non-Critical:

CUSTOMER TRAINING & DEMO ROOM

Item No.			
96	Distributor offers End-User training both pre and post installation.	(Critical)	<div style="border: 1px solid black; padding: 2px; display: inline-block;">2</div>
	No. of people: <u>5</u> Identify who is responsible to provide User training and complete skill assessment form.		
97	Distributor offers Technical Training for Customer Technicians	(Critical)	<div style="border: 1px solid black; padding: 2px; display: inline-block;">0</div>
	Verify		
	Training rooms: _____		
	No. of instructors: _____		
	System Types: _____		
	Updated documentation's _____		
98	Nortel Certified Instructors	(Non-Critical)	<div style="border: 1px solid black; padding: 2px; display: inline-block;">0</div>
99	Demonstration Room.	(Critical)	<div style="border: 1px solid black; padding: 2px; display: inline-block;">1</div>
	System Types: _____		

Sub Total Critical: 3
 Sub Total Non-Critical: 0

WEIGHTING FACTOR

The following two weighting factors are use throughout this checklist:

- 1) Critical - Deficiencies that may ;
 - a) Cause severe degradation to distributor operations;
 - b) Include incomplete or missing equipment and documentation crucial to daily routines;
 - c) Interrupt Mandatory support guidelines weakening Installation and Service
 - d) Be obvious contradictions to NORTEL policy and procedure.
 A Critical violation carries a Weighting factor of (2).

- 2) Non-Critical - A deficiency that intermittently affects operations and performance and may affect Customer Satisfaction. A Non-Critical Violation carries a Weighting factor of (1).

Each factor have a scale of 1 to 3 as follow:

- (1) - Need Improvement
- (2) - Good
- (3) - Excellent

Date of Evaluation: July-15-97

Total Critical :	117	X factor 2	234
Total Non-Critical:	31	X factor 1	31

Maximum Score:	474	Credited 12 points for N/A responses
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Distributor Score:	265
Distributor Evaluation %:	56%

Classification's:	Gold:	95% to 100%
	Silver:	80% to 94%
	Bronze:	70% to 79%

Comments/ Recommendations:

Gruein started to explain their organization and they stated that both offices are run exactly the same (procedure etc). Within the first hour-half they realized that there were differences between both offices. There needs to be a channel of communication between both office.

Gruein should be able to increase this rating by simply implementing some of the procedures in this evaluation.

Distributor Classification Levels

Bronze

- Installation
- First Level Technical Support
- Hardware Replacement
- User Training
- Meet Product's Competency Level
- Meet Nortel Customer Satisfaction Objectives
- Service Calls Tracking
- Quality Statistics

- New distributors
- Installed base: less than 50 M1's

Silver

- Bronze Plus:
- ✓ Second Level Tech. Support
- ✓ Project Management
- ✓ Eng. / Consulting Services
- ✓ Preventive Maintenance

- Installed base: (50) to (500) M1's

Gold

- Silver Plus:
- ✓ Certified Training Center
- ✓ System Test Facility
- ✓ Demonstration Room

- Installed base: over (500) M1's